



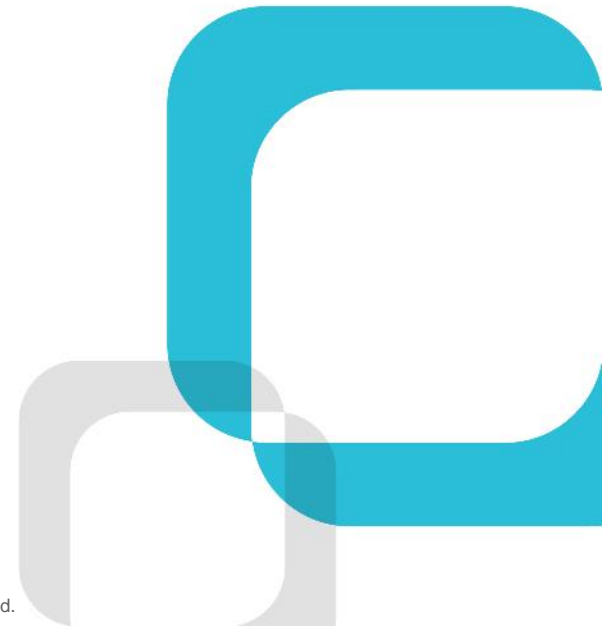
scottmadden
MANAGEMENT CONSULTANTS

Smart. Focused. Done Right.®



ScottMadden's Corporate & Shared Services Practice

March 2022



Who We Are

ScottMadden is a management consulting firm with more than **35 years** of deep, hands-on experience.

We deliver a broad array of **corporate and shared services consulting services**—from strategic planning through implementation—across many industries, business units, and functions.

WE DO

**WHAT IT TAKES
TO GET IT DONE
RIGHT**



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CORPORATE & SHARED SERVICES

EXPERIENCE

Our experienced team has been a pioneer in corporate and shared services since the practice began decades ago. We employ deep, cross-functional expertise to produce practical, measurable solutions.

SCOPE

We have completed more than 2,200 projects since the early '90s, including hundreds of large, multi-year implementations. Our clients range across a variety of industries from energy to healthcare to higher education to retail. Our areas of expertise span the spectrum of middle and back office corporate and shared services.

SERVICES

We have helped our clients with business case development, shared services design, shared services build support, implementation, and improvement.

Our corporate and shared services knowledge, expertise, and experience are unmatched—no other firm has helped more clients with more unique solutions.

Areas of Focus

TECHNOLOGY

From IT assessments and strategic direction to governance, cybersecurity, and risk and compliance management, we can help your organization get the most out of its IT investment.

We also help you optimize your projects to focus on delivering business outcomes not just installed technology.

HUMAN CAPITAL

We offer HR transformation (including HR shared services), analytics, HR systems (selection, implementation, and optimization), process design and continuous improvement, talent and employee engagement strategy and programs, and payroll—the services your organization needs to excel.

MULTIFUNCTION/GBS

We move shared services to the next generation—integrating finance, human resources, information technology, supply chain, and/or other business services into a single, multifunction shared services or global business services operation with effective governance and management.

SUPPLY CHAIN

We assist clients across the full range of supply chain processes and have the unique ability to create alignment between supply chain and its stakeholders. From crafting new supply chain strategies to restructuring your organization to improving your daily operations, we help you with every step.

FINANCE AND ACCOUNTING

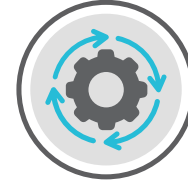
We help companies transform their finance and accounting operations. Through enterprise financial business services, strategic centers of expertise, intelligent automation solutions, hybrid insource/outsource delivery models, and other solutions, we help you increase value for your company.

BUSINESS SUPPORT SERVICES

We help our clients integrate various administrative services into their shared services model to improve service response performance to the business. Services often include real estate, facility maintenance, fleet, security, sales and marketing, insurance, customer service, research, and others.



Corporate and Shared Services Capabilities



Assess and Plan

- Strategic planning
- Feasibility analysis
- Benchmarking
- Statistical and analytical modeling
- Leading practices assessment
- Performance evaluation
- Project planning
- Leadership education and buy-in
- Staff evaluation
- Change readiness assessment
- Site visits

Design

- Current state analysis
- Future state design
- Business case development
- Service delivery model design
- Work scope delineation
- Policy assessment
- Intelligent automation strategy
- Sourcing evaluation
- Organizational design
- Technology evaluation
- Transformation planning
- Implementation planning
- Change management

Build

- Project management
- Service and transaction center build
- Detailed organizational design
- Staffing
- Policy harmonization
- Process redesign
- Technology design, selection, implementation, and support
- Education and training
- Facility design and setup
- Change management
- Sourcing implementation
- Metrics and dashboarding

Improve

- Analytics setup and deployment
- Operations improvement
- Governance
- Service expansion
- Cost reduction
- Process redesign
- Intelligent automation opportunities/implementation
- Technology upgrade
- Merger and acquisition integration
- Field resource development
- Voice of the customer surveys
- Metrics and performance management

How We Differ from Our Competition

	Strategy Firms	The Big Four	Outsourcing Advisory Firms	Functional Consultancies	ScottMadden
FOCUS	<ul style="list-style-type: none"> Strategy work Mergers and acquisitions Cost reduction 	<ul style="list-style-type: none"> Strategy and implementation work Large system implementations Outsourcing and offshoring Long engagements 	<ul style="list-style-type: none"> Advisory services regarding vendor-provided solutions 	<ul style="list-style-type: none"> Functional program development and/or support Delivery systems Unique products (e.g., surveys) 	<ul style="list-style-type: none"> Strategy and implementation work Efficient delivery models Full SSO lifecycle support Engagements scoped in manageable phases
APPROACH	<ul style="list-style-type: none"> Solutions focused on big picture, but not always practical Not often involved in implementation 	<ul style="list-style-type: none"> Off-the-shelf methodologies Client must adapt to consultant's approach Large project teams Get in and stay in; take over 	<ul style="list-style-type: none"> Sourcing analysis and solutions Standard methodologies Limited client involvement after data capture Neutral or vested interest as a provider 	<ul style="list-style-type: none"> Advisory role Research and program-based solutions Implementation of unique technologies 	<ul style="list-style-type: none"> Customized, practical solutions Small project teams Collaborative approach with clients Sale not mixed with delivery of work
PROJECT TEAMS & PEOPLE	<ul style="list-style-type: none"> Leverage reputation Teams comprised of mix of senior and junior resources Generalists Strong business acumen, weaker functional skills 	<ul style="list-style-type: none"> Sales team is not involved in delivery Teams comprised of junior, inexperienced resources with oversight by senior resources 	<ul style="list-style-type: none"> Sales team is not involved in delivery Teams comprised of junior resources with oversight by senior resource 	<ul style="list-style-type: none"> Leverage reputation Deep, functional knowledge; narrower focus 	<ul style="list-style-type: none"> Working partners meet with prospective clients Senior, experienced consultants with business acumen and functional knowledge

Representative Clients

Retail and Consumer Products	Manufacturing and Industrial	Technology and Communications	Higher Ed., Public Sector, and Defense	Energy and Utilities	Healthcare	Professional Services

Note: Representative sample; not all-inclusive of clients served. Excludes numerous well-known clients due to confidentiality agreements

Why ScottMadden?

DEEP EXPERTISE

- ScottMadden has been a pioneer in corporate and shared services since the practice began decades ago
- Our Corporate & Shared Services practice has completed more than 2,200 projects since the early 90s
- Our clients span a variety of industries from energy to healthcare to higher education to retail

PERSONALIZED APPROACH

- Before we begin any project, we sit down and listen to our clients' needs and challenges
- We engage with our clients like no other firm does, working side by side to create practical, real results
- We don't employ canned methodologies or cookie-cutter solutions. We work to solve the right problem in the right way

PHILOSOPHY

- We are personally invested in every project and measure our success by our clients' success
- We listen to our clients' needs and put their best interests ahead of our own
- We work with integrity, tenacity, and a genuine passion for what we do
- We do what it takes to get it done right

**Our expertise helps create
the right solution.
Our experience ensures
that it works.**



Our Values

Our success is the direct result of our people. The work of ScottMadden's employees is guided by these values:



We will be **accountable to our clients and each other** and operate in a manner that conveys a **genuine focus on service** founded on **mutual respect and trust**



We will place the **long-term good of our clients** above our own interest and conduct our business **ethically with humility, empathy, and fairness**



We will **exceed our clients' expectations**, we will do what we say we will do, and we will do it extraordinarily well



We will each be **stewards of ScottMadden's reputation**, and we will preserve and enhance it















We will maintain a **challenging, diverse, and inclusive work environment** centered on client success while **promoting collegiality, creativity, responsibility, and an overall esprit de corps**



We are personally invested in every project we take on.

ScottMadden's Proprietary Toolbox

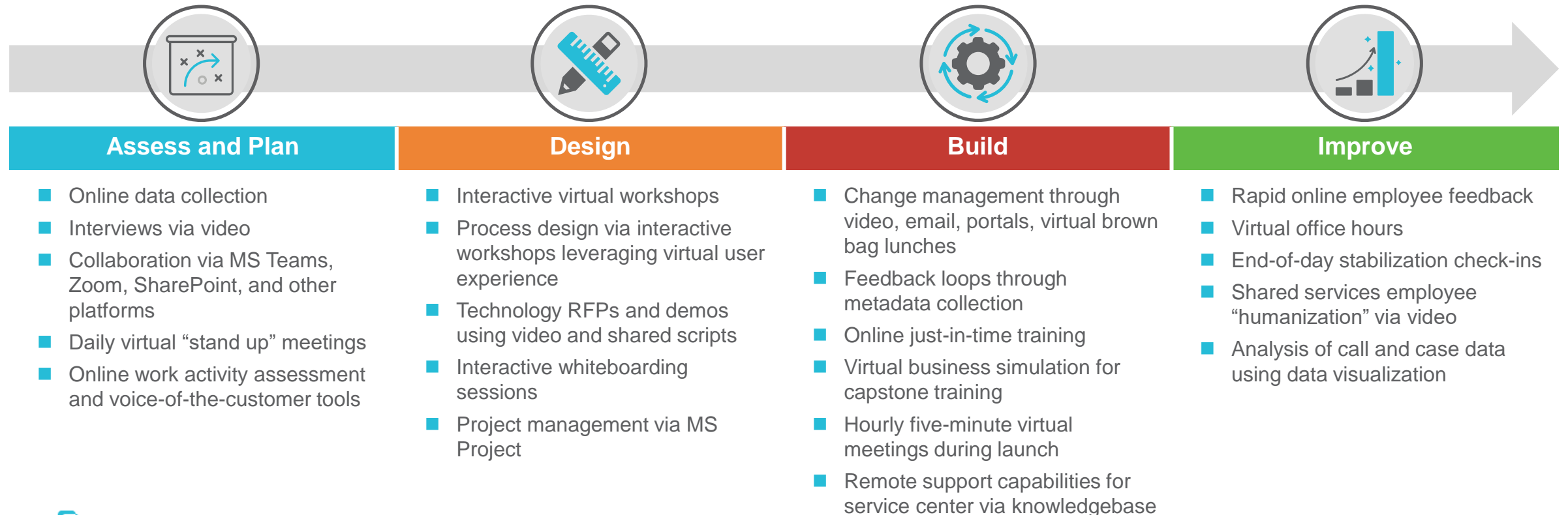
ScottMadden has dedicated research and data science and analytics functions. Our research team studies and maintains critical data on trends, metrics, and regulations that impact corporate and shared services organizations, while our data science and analytics team delivers complex analysis and automation using the latest techniques and technologies. Our toolbox includes many resources we will leverage when working with you.

ASSESSMENT TOOLS	RESEARCH	DATA SCIENCE & ANALYTICS	PROJECT ACCELERATOR
   <ul style="list-style-type: none">■ Voice of the customer surveys■ Work activity assessment■ Competency builder■ Spans and layers analysis	   <ul style="list-style-type: none">■ Primary functional research■ Proprietary shared services benchmarking studies■ Leading practices database■ Country regulations database	   <ul style="list-style-type: none">■ Data transformation, visualization, and business intelligence■ Intelligent automation■ Statistical modeling and machine learning■ Cloud computing	   <ul style="list-style-type: none">■ Project management toolkit■ Templates and collateral materials■ Change management toolkit■ Global site selection database

We employ a variety of tools built over years of experience to support our work and develop the best solution to meet your needs.

How We Consult in a Hybrid Working Model

The use of technology as a core part of our consulting approach has been evolving over the last several years. Even before the pandemic, many of our clients preferred a more remote or hybrid approach to project delivery to reduce project expenses. Additionally, many of our clients are geographically dispersed, so they are accustomed to virtual meetings and collaboration. With the unexpected advent of COVID-19, we have further adapted our consulting approach, using technology, to provide consulting advice, project management, “hands-on” support, and excellent client service while minimizing the need for an on-site presence.



HR Service Delivery Model Transformation for International Retailer

CHALLENGE

The HR organization of an international retailer with 230,000 employees across more than 3,000 locations was challenged by its highly decentralized HR service delivery model. HR functions were siloed by brand and location, limiting the ability to effectively scale and leverage HR services. ScottMadden was engaged to design and implement an HR service delivery model that addressed some of the common HR challenges within the retail industry, including lack of employee email access, inconsistent representation of field HR across multiple stores, and variation in processes and policies across the retailer's family of brands.

PROCESS

- Conducted a survey to compile the types of questions that different roles were fielding to better understand how and where employees were seeking HR support. Developed knowledgebase articles to allow the service center to address employee questions at first contact
- Established specific owners for all HR work activities. Harmonized company-wide policies and redesigned human resources processes
- Developed customer service training for HR staff in response to employee feedback on service levels
- Developed internal operating processes and improved technologies to increase efficiency of customer request intake and resolution

RESULTS

- Improved HR services and enabled HR to provide more cross-functional, cross-brand support
- Improved strategic support provided to brands by the HR COE functions, while also enhancing the COE's scalability and leverage for future growth
- Enhanced accessibility of HR services for store employees
- Created infrastructure for knowledge transfer and sharing across the brands to improve the consistency and quality of services delivered



Finance Shared Services Design for a Healthcare Equipment Company

CHALLENGE

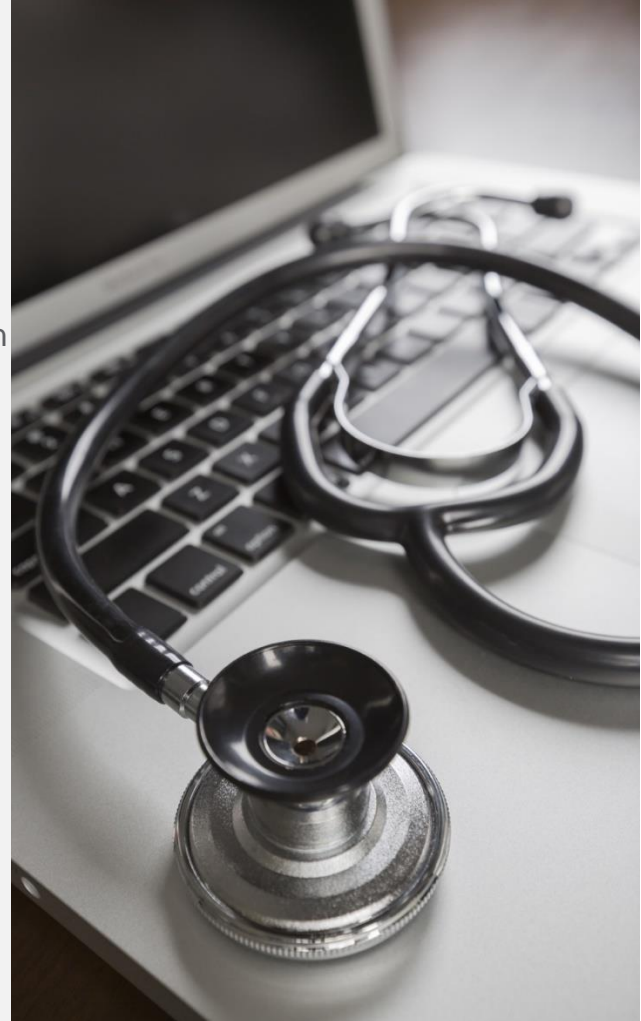
A global medical equipment company had experienced rapid growth, particularly in its Asia-Pacific (APAC) region. As a result of that growth, finance processes and policies evolved within each country with little to no harmonization and alignment. While accounts payable and accounts receivable services were already being delivered efficiently and effectively, the client identified the need for a more scalable model to support a rapid-growth environment. ScottMadden was engaged to design a finance shared services model that could serve more internal and external customers, while further improving efficiencies, effectiveness, and customer service.

PROCESS

- Deployed voice-of-customer survey to establish a baseline and measure customer perception against internal finance perception of performance
- Conducted a process-capture survey to determine the differences in processes across the countries within the APAC region
- Compared technologies, roles and responsibilities, policies, and government regulations across nine APAC countries
- Supplemented process capture survey data with client interviews in Southeast Asia and Japan

RESULTS

- Presented recommendations for centralizing accounts payable and accounts receivable functions within the APAC region
- Identified higher-risk processes and services due to varying government regulations and developed a staffing plan to address risks
- Recommended process changes to promote alignment across geographies where possible
- Developed a shared services delivery model that could scale with an estimated 19% growth, while also providing an NPV of \$5 million



Innovative Model for Delivering Shared Services in Higher Education

CHALLENGE

A large Canadian research university with more than 20,000 students was experiencing low levels of satisfaction across its portfolio of administrative services. At the same time, overall university administrative support costs continued to grow. The university's leadership desired to transform its administrative functions to provide best-in-class service aligned with the university's teaching, research, and community service mission, vision, and goals. With the help of ScottMadden, the university designed and implemented an innovative, horizontally and vertically integrated shared services model across human resources, finance, and research.

PROCESS

- Conducted an in-depth review of the university's in-scope functions and developed a baseline inventory for staffing, costs, volumes, and customer satisfaction
- Redesigned the organizational structures and service portfolios
- Realigned work and right-sized the organization; defined new roles and responsibilities
- Designed and implemented supporting infrastructure to track and measure future performance improvements

RESULTS

- Developed an innovative shared services delivery model featuring high-touch, easily accessible "storefronts" in desirable on-campus locations where faculty, staff, and students could receive personalized service
- Consolidated transactional support activities, such as payroll, into a single service center to facilitate more efficient processing
- Consolidated administrative support footprint to free up valuable on-campus real estate for teaching and research
- Created a framework for the university to scale more effectively and efficiently with growth
- Improved customer satisfaction with revamped administrative service delivery



HR Data Visualization in Healthcare

CHALLENGE

The HR group of a large healthcare network, more than 13,000 employees, was seeking a way to easily identify trends across the enterprise to highlight potential issues. The objective was to bring together data from disparate data sets, including the HR information system, employee engagement, employee relations, patient satisfaction surveys, talent acquisition system, performance ratings, and HR's turnover cost estimate analysis, to provide a comprehensive view of the enterprise's HR position across time periods, business units, departments, and job classes. With the help of ScottMadden, the HR group created a solution that brought these data sets together in a single dashboard for its HR business partners (HRBP). This gave them immediate and extensive visibility into departments under their purview with an ability to quickly identify potential issues, enabling them to act as strategic advisors to the business.

PROCESS

- Met with HR leaders to determine the capabilities to be enabled by the solution
- Drafted a dashboard layout with the HR team and identified the required data sets
- Scripted data manipulation and built the dashboard
- Reviewed and validated output with the SMEs and HR leadership

RESULTS

- Deployed a scalable, self-service solution for HR to identify trends, emerging issues, and performance concerns across the enterprise and down to the manager level
- Informed HRBPs on areas to focus their attention to perform root cause analysis
- Enabled HRBPs to advise departments under their purview of potential issues



RPA Pilot and COE Design

CHALLENGE

A leading provider of online legal research utilized large groups of labor based in low-cost global locations to conduct repetitive process work. Robotic process automation (RPA) presented an opportunity to reduce large amounts of manual work and gain a competitive edge. However, differing opinions of RPA roles for business operations, IT and a new COE posed numerous governance challenges. ScottMadden was retained to conduct a pilot and help design a sustainable governance model for an enterprise-wide RPA program.

PROCESS

- Met with stakeholders to identify problem processes
- Measured process volume and time to estimate RPA ROI
- Down-selected high-volume, high-impact processes
- Mapped and recorded processes in detail
- Scripted five processes in UiPath
- Tested with historical data and completed user signoff
- Conducted training to build client internal capability
- Designed a hybrid governance model and defined COE roles
- Validated governance recommendations in workshop setting
- Assisted with robot move to production

RESULTS

- Documented immediate ROI and 10X improvement in process speed
- Trained staff to locate, map, script and test their own processes
- Established an initial RPA COE and gained agreement on roles



LEADERSHIP



Scott Manning

Partner and Corporate and Shared
Services Practice Leader

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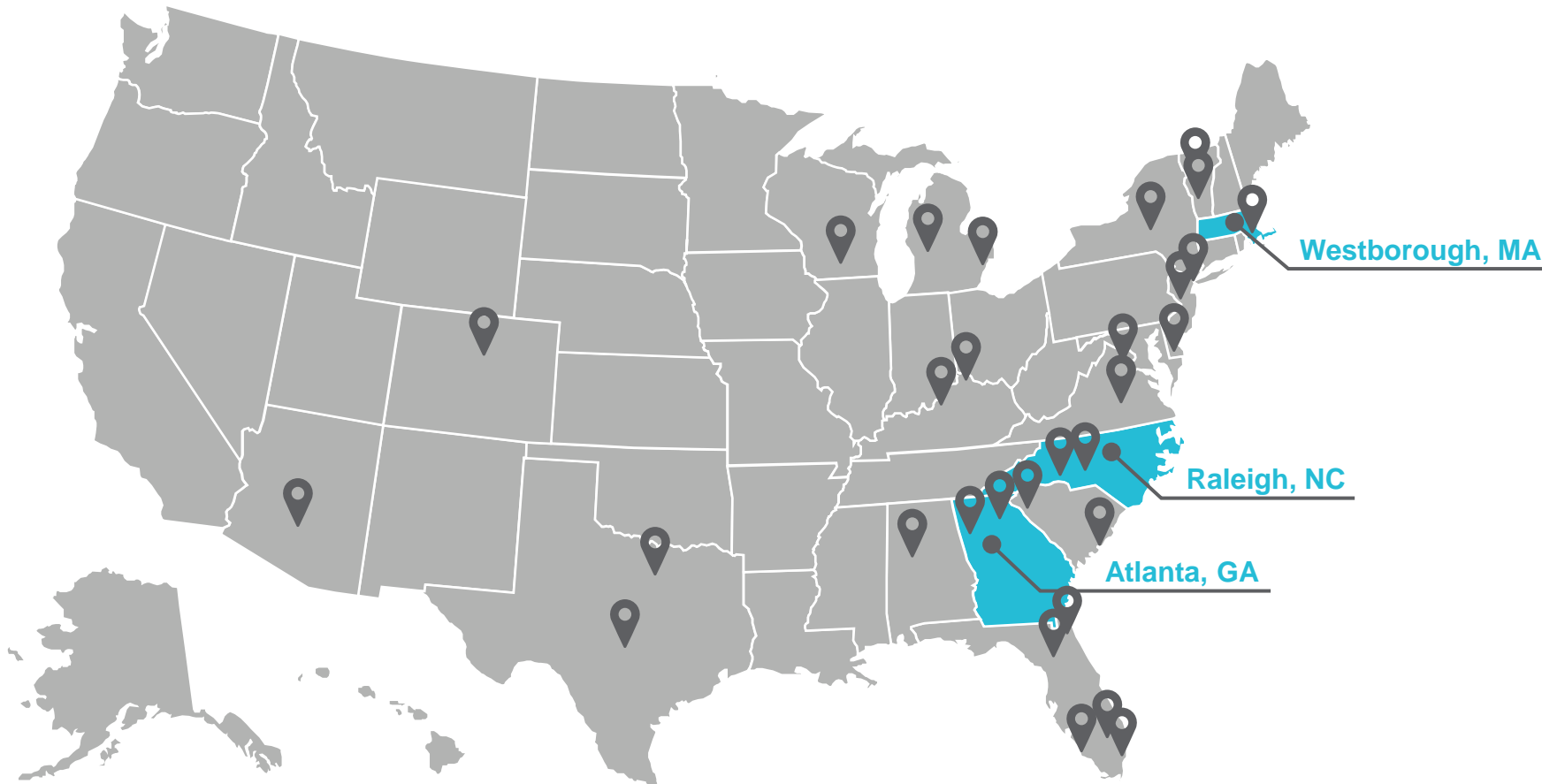
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Where We're Located

We have three main offices located in Atlanta GA, Raleigh NC, and Westborough MA and consultants who live in many other cities.




ScottMadden Headquarters

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Raleigh, NC 27608

 919.781.4191


Atlanta Location

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Atlanta, GA 30305

 404.814.0020

Massachusetts Location

1900 West Park Drive, Suite 250
Westborough, MA 01581

 508.202.7918

 Home Offices  Remote Employees

ScottMadden maintains three offices but allows our consultants to work remotely.